

Key Strategies for Connecting People Experiencing Homelessness to SSI/SSDI Benefits

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Presenters

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- **M L Jordan**, Social Security Administration (SSA)
- **Jayme Marshall**, HHS Substance Abuse and Mental Health Services Administration (SAMHSA)
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Key Strategies for Connecting People Experiencing Homelessness to SSI and SSDI Benefits

- Developed by USICH, SSA, SAMHSA, and VA
- Provides guidance to the field on key strategies for linking eligible adults to benefits
- Intended to improve practice and collaboration among SSA field offices, VAMC staff, and other organizations and community-based partners

Key Strategies for Connecting People Experiencing Homelessness to Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) Benefits





The Importance of SSI and SSDI for People Experiencing Homelessness

- SSI/SSDI are a **primary source of income** for many people experiencing homelessness with disabilities.
- **Can be used to pay for:**
 - housing,
 - essential household needs,
 - and medical care or supplies.
- SSI/SSDI benefits, in concert with other programs, can help individuals experiencing homelessness transition into **stable and permanent housing**.



Five Key Strategies

1. Assisting People Experiencing Homelessness with the SSI/SSDI Application Process
2. Coordination with SSA Field Offices, Community Organizations, and other Federal agencies
3. Coordination with other Benefits and Entitlements
4. Working with Veterans and other Special Populations
5. Assisting SSI/SSDI Beneficiaries Post-Entitlement



Comparison between the SSI and SSDI Programs

SSI Program	SSDI Program
Must meet the definition of disabled or blind, or be age 65 or older	Must meet the definition of disabled or blind
Not based on any requirement of insured status	Based on insured status of the individual or another qualified person
Income and resource limits	No unearned income or resource limits
Monthly benefit amount based on the FBR	Benefit amount based on Federal Insurance Contributions Act (FICA) earnings during work history
No work history requirement	Work history generally required
Living arrangements may affect eligibility and benefit amount	Living arrangements have no effect on eligibility or benefit amount
Medicaid eligibility in most states	May be eligible for Medicaid
Not eligible for Medicare, unless also entitled to SSDI or age 65 or older	Eligible for Medicare 24 months after entitlement to SSDI benefits



Defining Disability

- 1. Medically Determinable Physical or Mental impairment**
Illness must either meet or be equivalent to the “listing” criteria used by DDS. Supporting information must be documented in medical records
- 2. Duration**
The impairment tied to the illness(es) must have lasted OR be expected to last 12 months or more OR be expected to result in death
- 3. Functional Information**
Applicants must demonstrate that significant functional impairment related to the illness(es) exists that impede their ability to work
- 4. Substantial Gainful Activity (SGA) = \$1,130/month**

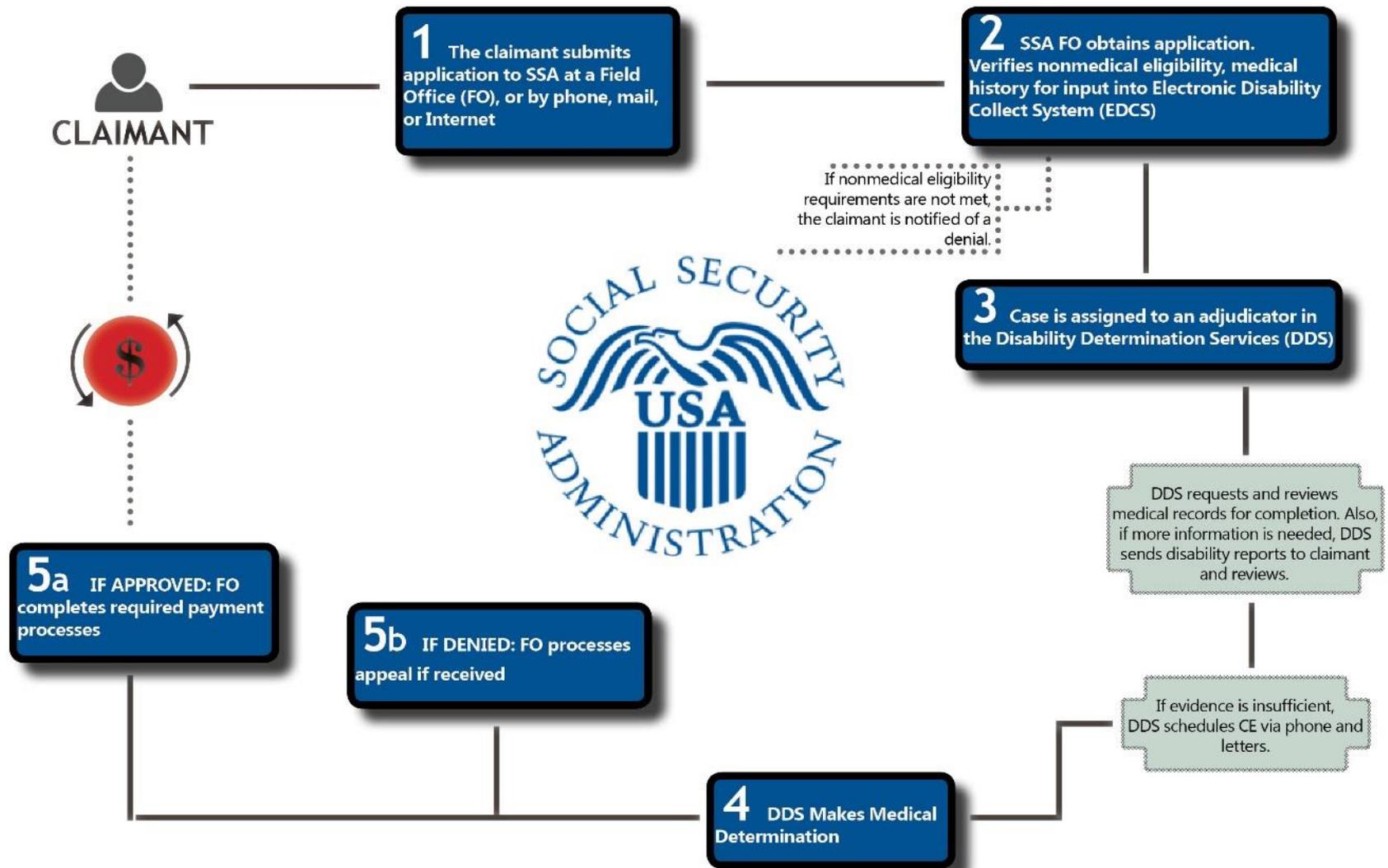


Overview of the Application Process

SSI and SSDI applications can be filed using the following methods:

- **In-person** at a local Social Security field office
- **By mail**
- **Online** (SSDI only)
- **By calling** the SSA toll-free number to schedule an appointment

Initial Social Security Disability Claims Process Overview





1) Assisting People Experiencing Homelessness with the Application Process

- Become a Contact Person, Appointed Representative, or Representative Payee
- Help Claimant Create a “*my Social Security*” Account and Use It to Verify Clients’ Benefits Status
- Participate in SOAR Training
- Help Claimants Get Identification Documents
- Contact SSA to set a Protective Filing Date
- File SSDI online application
- Declare Homeless Status before the Application Process Begins
- Collect Medical Evidence Needed to Determine a Claimant’s Medical Eligibility
- Write a Medical Summary Report
- Use Electronic Records Express



Become a Contact Person, Appointed Representative, or Representative Payee

- As a **contact person**, the representative of the service provider organization serves as a liaison between the SSA and DDS and the claimant.
- **Appointed representatives** are authorized to receive information and take action on the claimant's behalf.
- A **representative payee** agrees to accept and manage a recipient's benefits over time if SSA finds the claimant not capable to do this on his/her own.



Participate in SOAR Training

<http://soarworks.prainc.com/>

- Free, web-based course to train case managers in completing SSI/SSDI applications using SOAR
- Standardized, self-paced training
- Assistance throughout the course available from the SOAR TA Center and state/local SOAR Leaders
- Includes completion of a practice SSI/SSDI application
- Individualized feedback from the SAMHSA SOAR TA Center
- 16 CEUs from NASW
- Class 1 of the course provides a SOAR 101



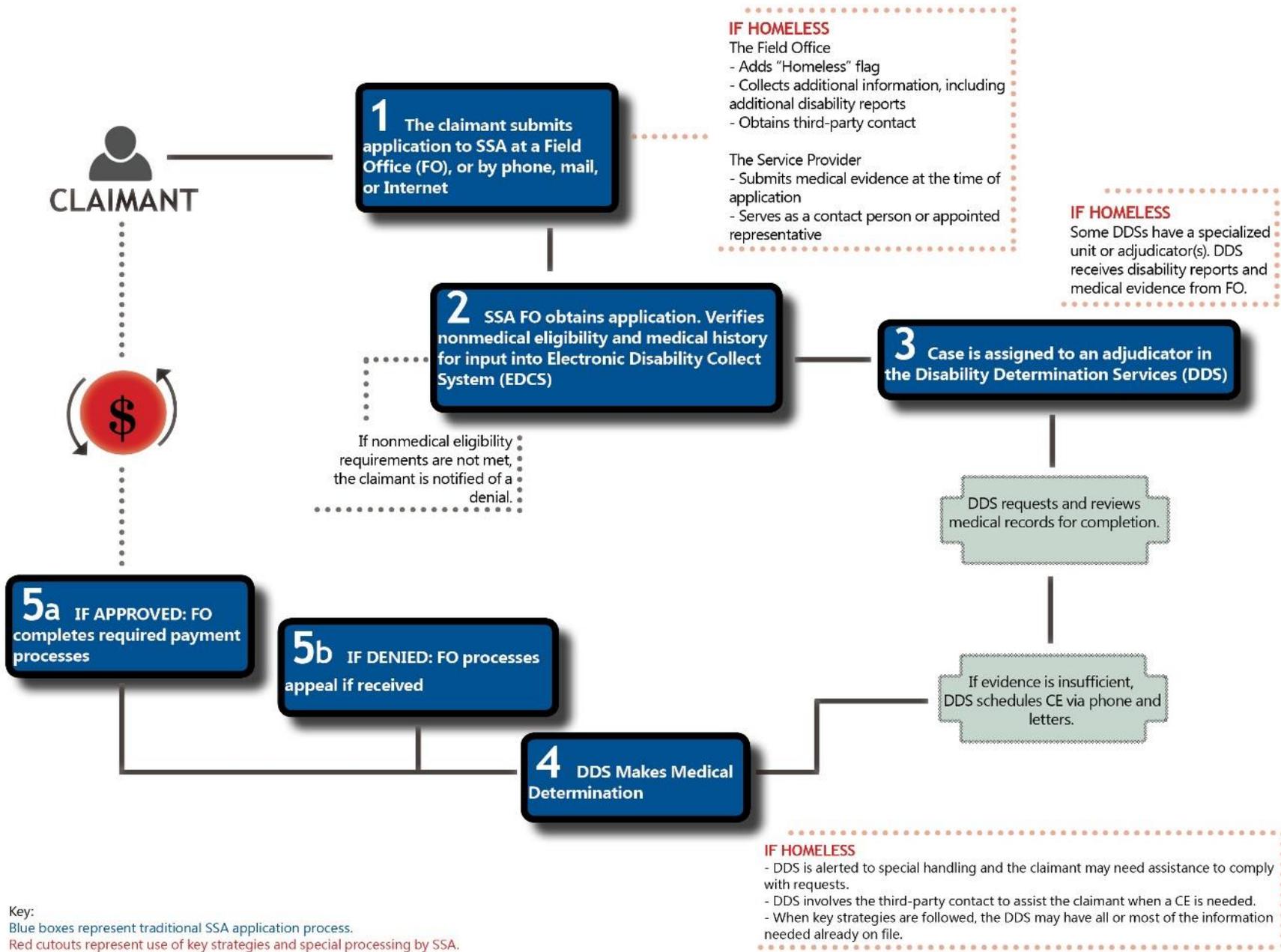
File SSDI Online Application

- SSDI applications **available online**, but SSI applications *not* yet available online
- Visit www.socialsecurity.gov and select “**Apply Online for Disability**”
- Once finished, SSA will contact the claimant for additional information needed for the application



Declare a Homeless Status for Claimants before the Application Begins

- SSA will add an **electronic “flag”** to the application
- Can be made when the claimant or service provider schedules an appointment, when the field office takes an application, or if filing online (in the remarks section)
- Alerts field office and the DDS to **special case processing**
- Upon receiving the flag, the Field Office obtains additional information including:
 - Additional contact information, including a contact to serve as third party;
 - Information about ability to function and to perform activities of daily living; and
 - Detailed information about the past work



Key:
 Blue boxes represent traditional SSA application process.
 Red cutouts represent use of key strategies and special processing by SSA.



Collect Medical Evidence to Determine Medical Eligibility

The following information is needed for the disability determination:

- Names and addresses of **doctors and medical treatment facilities**;
- **Dates of treatment** and other information related to the disability;
- Any source of **medical evidence** supporting the disability;
- Information on **education, work experience, and daily activities** both before and after onset of disability;
- Other important **facts showing effects of the impairment** on ability to perform work-related functions.



Writing a Medical Support Report

- A letter written by the service provider and submitted as part of the application packet and includes:
 - Documentation received;
 - Narrative account of claimant's personal treatment history; and
 - Service provider's observations and assessments of the claimant's ability to function.
- Form SSA-3373: Function Report
- Co-signed by a Physician or Psychologist



2) Coordination with SSA Field Offices, Community Organizations, and other Federal Agencies

- Establish Formal and Informal Relationships
- Participate in Local Strategic Planning Meetings
- Strengthen system-wide communication and collaboration



The SOAR Process

- Establishes communication with designated field office/DDS representatives
- Describes the respective roles of the SOAR provider and field office/DDS representatives
- Promotes electronic submission of all available SSA documents and medical records
- Includes a quality assurance checklist with each SOAR-assisted application
- Utilizes the SOAR Consent for Release of Information Form to check the status of potential claimants and set a protective filing date
- Utilizes the 60-day protected window to compile complete applications, including all required forms, medical records, and MSRs, to reduce duplication of effort with the DDS and to reduce the need for CEs



3) Coordination with other Benefits and Entitlements

Eligibility and documentation requirements for SSI/SSDI applications **may be identical or similar** to application requirements of other benefit programs.

- Coordinate with other Benefits and Entitlements:
 - Medicaid
 - Medicare
 - SNAP
 - TANF
 - *Others*
- Take Applications at Special Events



4) Working with Veterans and other Special Populations

- People Involved in the Criminal Justice System
- Youth Transitioning Out of the Foster Care System
- Veterans



Collaborations with Corrections

NY's Sing Sing prison & NYC community service agency

- Same staff does pre-release applications and follows individuals in community
- 86% of 255 pre-release applications approved in 85 days on average

Miami / Dade Jail Diversion Program

- 91% of 288 applications approved in average of 37 days
- Housing and treatment provided upon release based on likelihood of SSI approval
- Recidivism dropped from 70% to 22% comparing the year before and after SSI approval; demonstrated \$7 million in savings to the state of Florida



Working with Transition Age Youth

- Youth transitioning out of foster care are a particularly vulnerable population with high risk for homelessness
- Children and youth in foster care are more likely to have a physical or mental disability than those not in foster care
- Service providers can work with eligible youth to start the SSI application process 90 days prior to transition
- Age 18 redetermination
 - At age 18, young adults who were eligible for SSI as children are evaluated to determine if they qualify for benefits under the more restrictive adult definition of disability



Working with Veterans

VA Federal Staff

- VHA Memorandum in October 2013 encouraged VHA federal staff to participate in SOAR training and assist with SSI/SSDI applications
 - Minor exclusions from serving as the authorized representative or payee
- VHA Homeless Programs Office continues encouraging access to resources by supporting staff cross-training in VA and SSA benefits

Other VA Initiatives

- VA and SOAR Pilot Program
- Supportive Services for Veteran Families (SSVF) Program



VA and SOAR Pilot: Lessons Learned

- One-year pilot began in October 2014 to utilize SOAR in HUD-VASH and H-PACT in Chicago, Long Beach, Portland, and Seattle
- Facilitated guidance through the SOAR Online Course led to a 100% pass rate for participants on their first attempt
- Technical assistance in establishing connections between VA staff and community partners for both 1696 representation facilitated strong collaborations
- Once infrastructure was in place, participants quickly began assessing Veterans and working on applications, indicating the potential for rapid scale up
- Chicago reports that great collaboration amongst the different homeless program teams is a critical part of their success
- Those participants who were able to dedicate staff time to SOAR were able to successfully complete the SOAR Online Course and begin applications



Supportive Services for Veteran Families (SSVF)

SSVF program promotes housing stability and facilitates access to mainstream resources

- Notice of funding includes the expectation that grantees will use the SOAR program through community linkages or staff training
- Funds dedicated benefits specialists and encourages training for staff

September 2015 Survey:

- Services include increasing access to mainstream benefits
- Over half of the 380 SSVF grantees are actively using SOAR to help Veterans access SSA disability benefits
- 91% of grantees who responded said that SOAR would be a useful tool in helping Veterans access benefits and income
- 40% of grantees have SOAR-trained staff, with an average of 2.27 trained staff per grantee
- 14% have an SSVF funded position for a SOAR benefits specialist



Cross-training on VA and SSA Benefits

- Applying for both SSA and VA benefits at the same time helps ensure the Veteran can access income as quickly as possible
- Opportunities to increase efficiency in assessing eligibility and referral to SOAR
- SOAR Works to End Veteran Homelessness: VA Caseworker's Guide
 - Step-by-step guide on using SOAR after completing the SOAR Online Course
 - Crosswalk of where to find key information for SSI/SSDI in VHA assessments, reducing the need for multiple interviews specifically for SSA benefits
 - Full of tips on how to efficiently complete applications using the SOAR model



SSA Fast Track Programs for Veterans

100% Permanent and Total Veterans Initiative

- Expedites SSI/SSDI applications from Veterans who have 100% P&T rating from the VA
- Does not guarantee SSI/SSDI approval

Wounded Warriors

- Veterans who received disabling mental or physical health injuries while on active duty on or after October 1, 2001
- The injury does not need to have occurred during combat operations

*The definition of disability and application process is different for VA and SSA benefits



5) Assisting SSI/SSDI Beneficiaries Post-Entitlement

- Report Changes in Work Activity
- Report Changes that may Affect SSI
- Utilize Work Incentives and Employment Supports



Other Features of the Key Strategies

- Sample Medical Summary Report
- Information on additional benefits available for Veterans
- A Glossary of Terms



Q & A



Stay Connected!

- Access the resource online: <https://usich.gov>
- Visit the SOAR website: <http://soarworks.prainc.com>
 - Free online training available
 - Connect with SOAR TA Center Liaisons and leads in your state
 - Reach out with questions about the model
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